

DOI Work Activity T7: Provide Beneficiary Trust Representation Services

Program Area:	Indian Trust Fulfillment
End Outcome Goal:	SEO 3 - Fulfill Indian Fiduciary Trust Responsibilities
Intermediate Outcome:	This activity does not align to an intermediate outcome
DOI Sub process:	3b – Provide direct community services

Work Activity Description: Activity includes all costs associated with beneficiary trust representation involving proactively communicating, providing trust management services, and representing the best interests of the beneficiaries in all trust matters. Also includes all costs to provide beneficiaries with timely and accurate information on trust accounts as follows:

- ◆ Advise beneficiaries and other DOI personnel on trust management processes and issues;
- ◆ Represent beneficiaries in fiduciary trust interests concerning trust assets and provide oversight of land and natural resource management;
- ◆ Provide beneficiaries with timely and complete fiduciary trust information and reports, and conduct consultation with tribal and individual trust beneficiaries regarding management of fiduciary trust assets via telephone, walk-in, facsimile, letter or email;
- ◆ Operation of the OST 1-800 Customer Service call center for the purpose of communicating and interacting with Indian beneficiaries and other requestors;
- ◆ Facilitate beneficiary involvement in developing trust management plans, acquisition and disposal, and conveyances of trust assets;
- ◆ Provide Indian tribes with technical assistance to develop, implement, and manage their tribal trust fund investment plans;
- ◆ Provide outreach meetings with tribes and beneficiaries by advertising in Indian Country to begin resolving issues (i.e., development and implementation of outreach plan);
- ◆ Increase the number of tribes that participate in cooperative audit programs for mineral leases;
- ◆ Provide hands-on opportunities (through the Intergovernmental Personnel Act [IPA] program) to give Tribes knowledge and experience in performing royalty management processes; and
- ◆ Coordinate DOI efforts in providing trust services.

Output: Response to request	Unit of Measure: Number of requests processed
Inputs: Request/contact (telephone, fax letter, e-mail or walk-in) staff time, duplication costs, travel, and IT costs	Cost Drivers: Request for service information and American Indian Trust Fund Management Reform Act (1994)

System Interfaces: MS Excel/Access, manual logs, Trust Fund Accounting System (TFAS), Histran, A-17, Stratavision, and Customer Strata Station (CSS)

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